YOUTH PROGRAMS
Toolbox 2.0 Desk Aid

Enrolling a Job Seeker in the Youth Program

To enroll a job seeker in the youth program, they need to have an active registration. Reference the Job Seeker Registration desk aid for directions on how to register a job seeker.

Updating the Job Seeker's Record

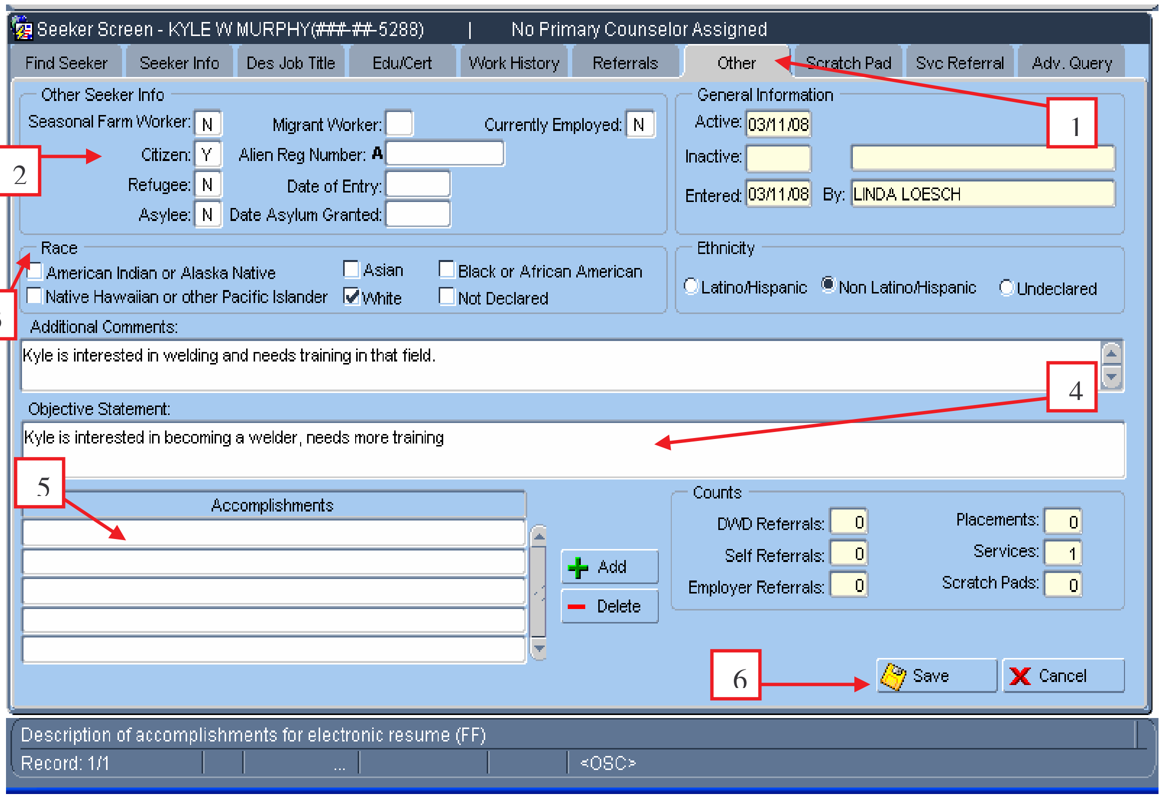

Figure 1: Seeker Other Screen

Step-by-Step:

1) To update a job seeker's record, click on the "Other" tab on "Seeker Screen"
2) Complete the "Other Info" section of the "Other" screen.
3) Select the job seeker's "Race" and "Ethnicity"
4) Complete the "Objective Statement". This will transfer to the electronic resume.
5) Enter additional accomplishments in the "Accomplishments" chart, by clicking on the box.
6) Click on the "Save" button.

Initial Interview

The purpose of the Initial Interview is to provide a brief informal assessment of the customer's immediate needs.

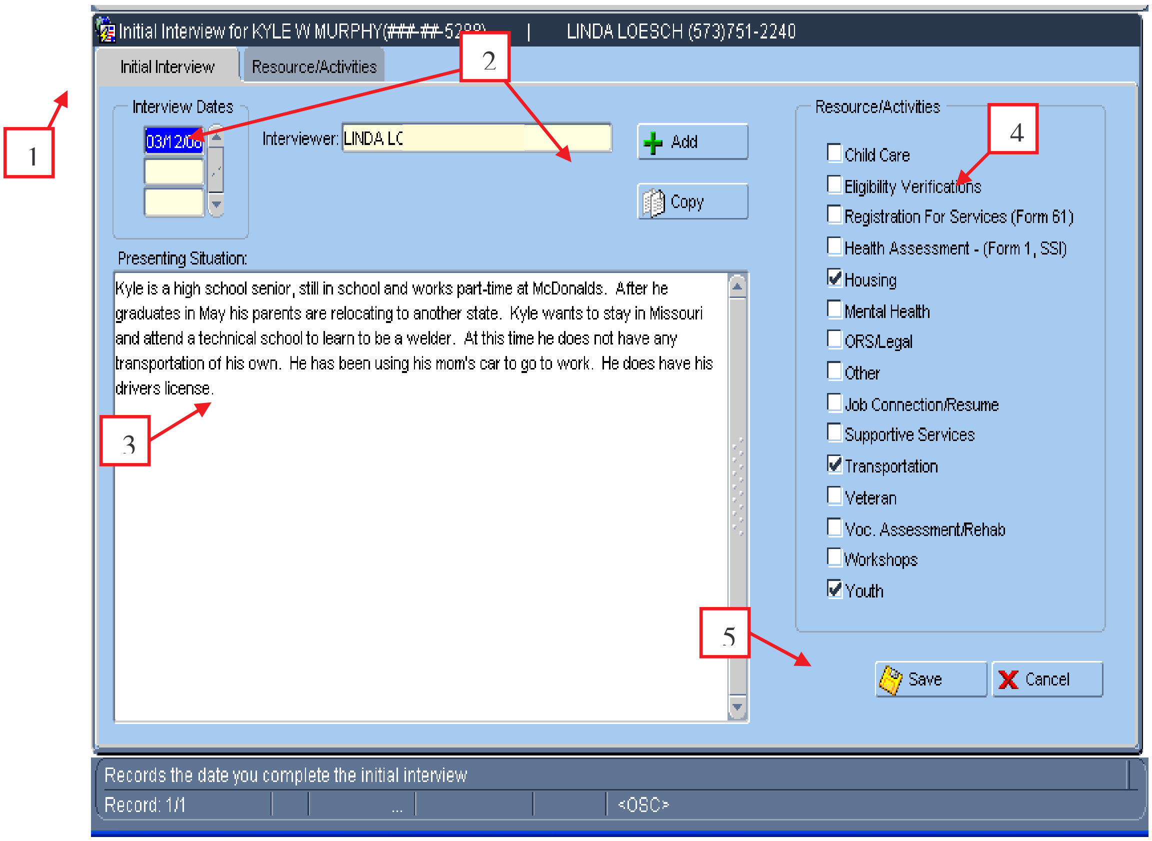

Figure 2: Initial Interview Screen

Step-by-Step:

1) Click on Initial Interview  icon
2) The "Interview Dates" section allows the worker to create additional Initial Interview records. Click on the "Add" button to create new records. If the case manager wants to create a new record using the data from an existing record, click on the "Copy" button. The information can be modified during the day it was entered.
3) Summarize the customer's current situation, their family or household by clicking on the "Presenting Situation" section. Address items like marital status, members of the household living in the home, and whether the customer has dependent children. The customer's education, employment and skills also need to be addressed in this section.
4) Check the boxes in the "Resources/Activities" section that have been determined as issues for the customer at this point in time.

5) Click the "Save" button.

The purpose of the <u>Initial Interview-Resource/Activities tab screen</u> is to enter a brief description of possible resources and how the customer can access those resources. Only the boxes that were checked on the Initial Interview screen will be available to enter information, all other boxes will be protected.

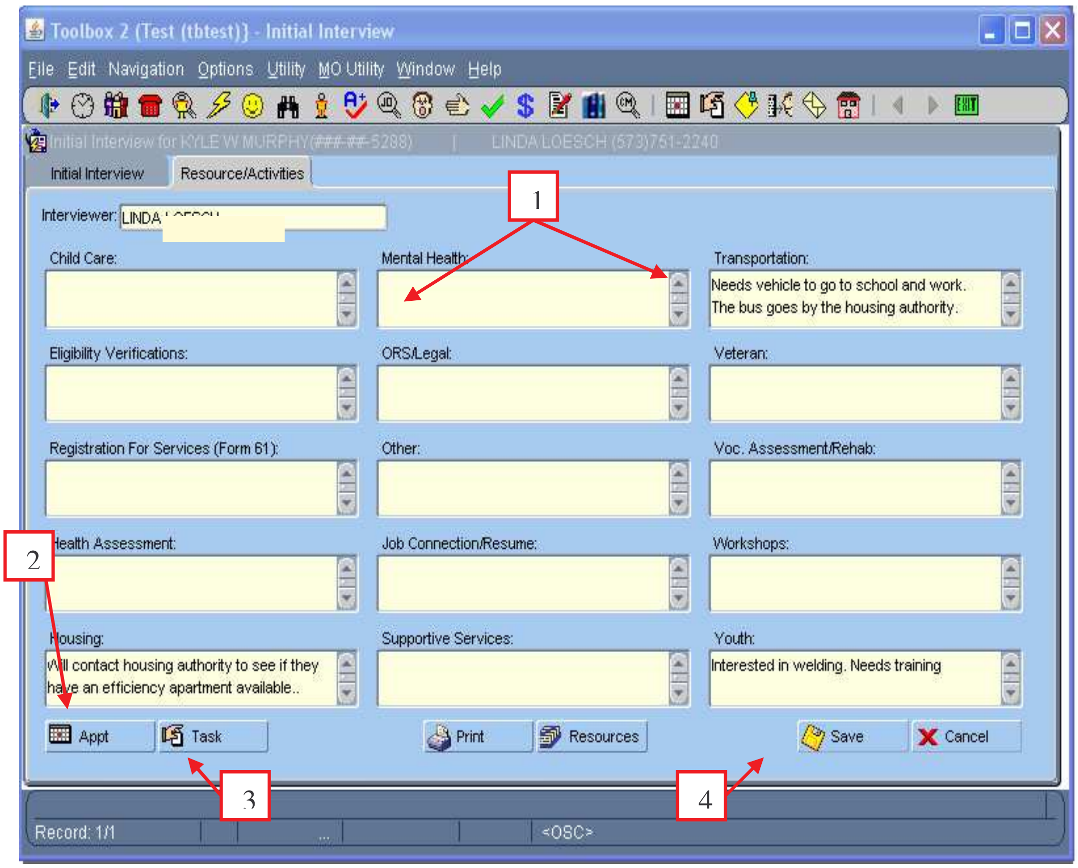

Figure 3: Initial Interview Resources/Activities Screen

Step-by-Step:

1) Enter brief details in every box that were determined on the Initial Interview screen as issues for the customer. The information entered should provide the customer with enough details about the resource or referrals to enable them to access the services available to them.
2) Click on the "Appointment" button to create an appointment for the customer to meet with another worker.
3) Click on the "Task" button to set a task for the customer.
4) Click the "Save" button.

Assessment

In order to access the Assessment Screen you will need to first go to the Seeker Information Screen to enroll the job seeker into Case Management.

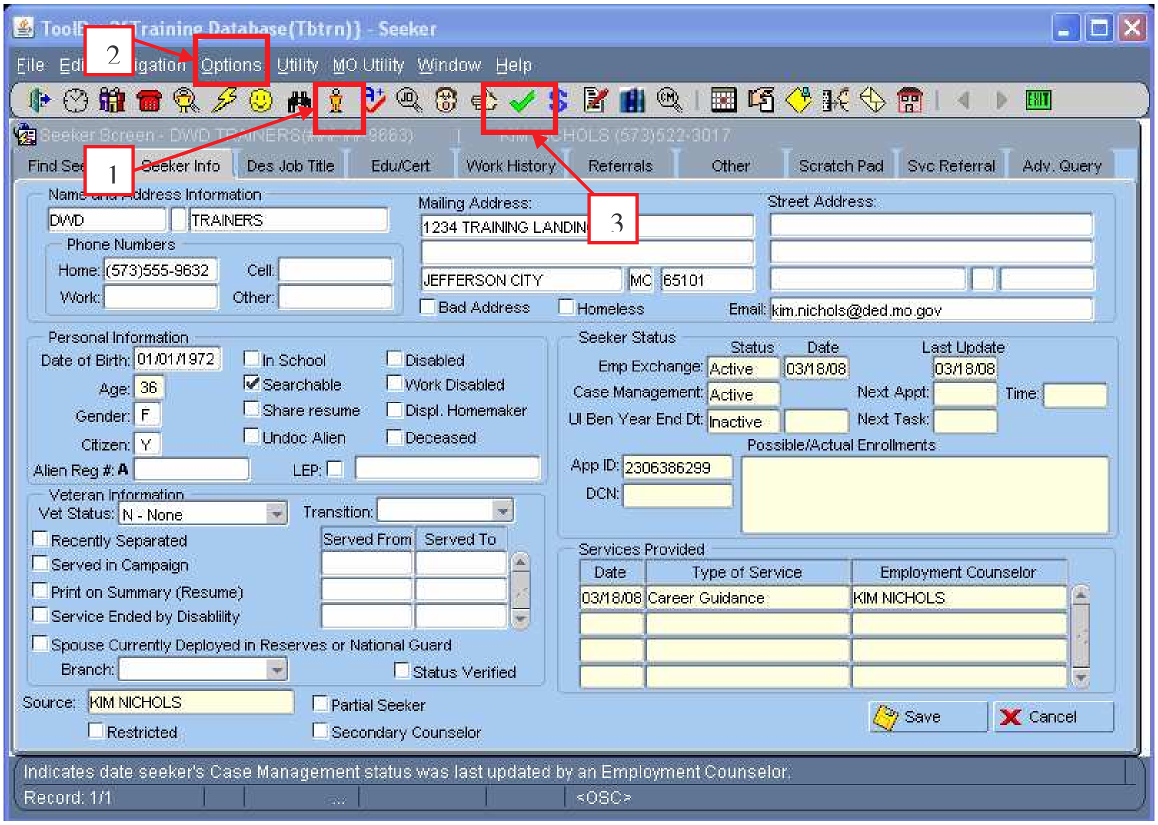

Figure 4: Seeker Screen

Step-by-Step:

1) Click on the Seeker icon .
2) Click on the "Options" tab on the tool bar, then scroll down to "Activate/Inactivate Case Management" and click on it to activate Case Management.
3) Click on the Assessment icon 

<u>The Assessment Employment Tab</u> is used to enter information about the customers work potential and barriers.

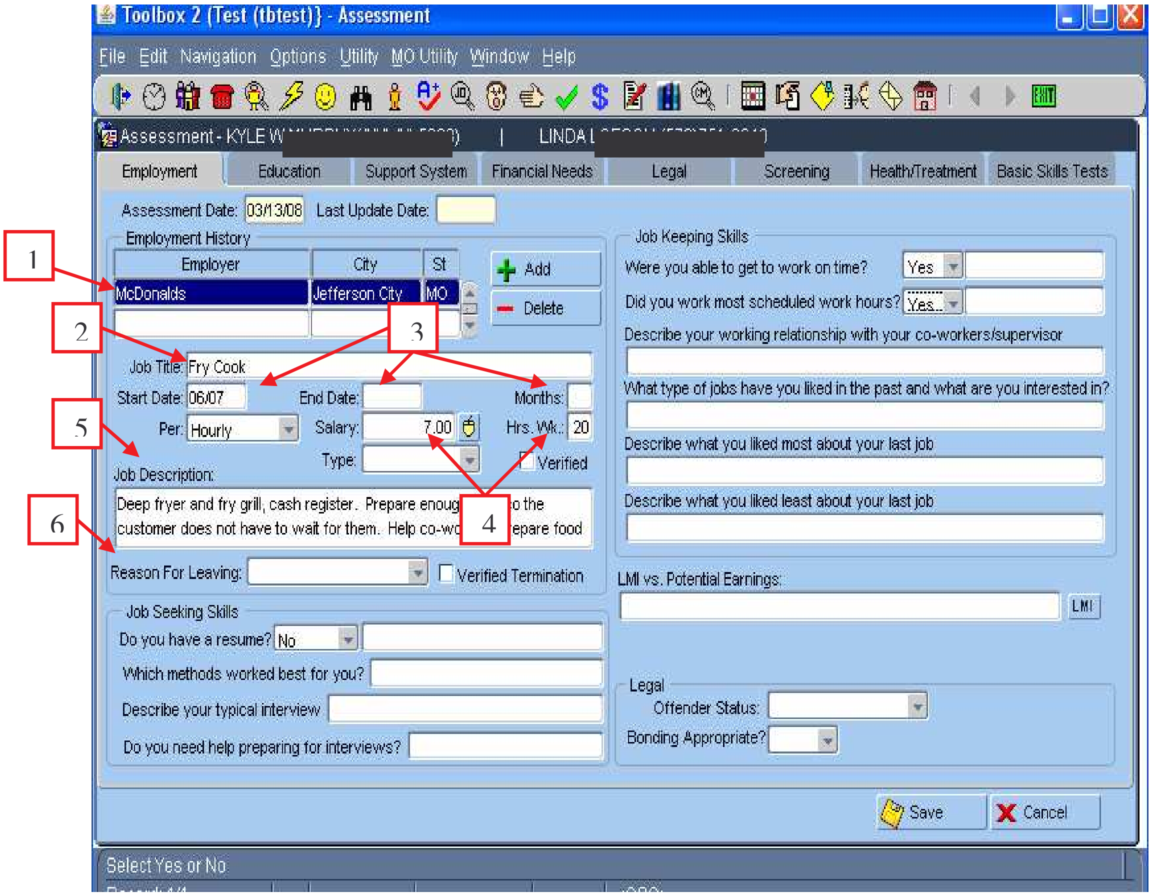

Figure 5: Assessment
Employment Tab Screen

Employment History Section

The "Employment History" section of the screen includes the customer's "Employment History" that was entered on the "Seeker Employment History" screen. These records will display on the "Seeker" screen.

Step-by-Step:

1) To add new records, click on the "Employer" text box; enter the employer name, city and state.
2) Click on the "Job Title" text box, enter the job title.
3) Enter the "Start Date", "End Date" and "Months" of experience.
4) Select the correct wage value from the drop down list. Enter a wage in the "Salary" text box and enter the number of "Hours Week".
5) Enter a "Job Description" for the job that is being entered in the text box.

6) Select the correct value from the drop down list for the “Reason for Leaving”.

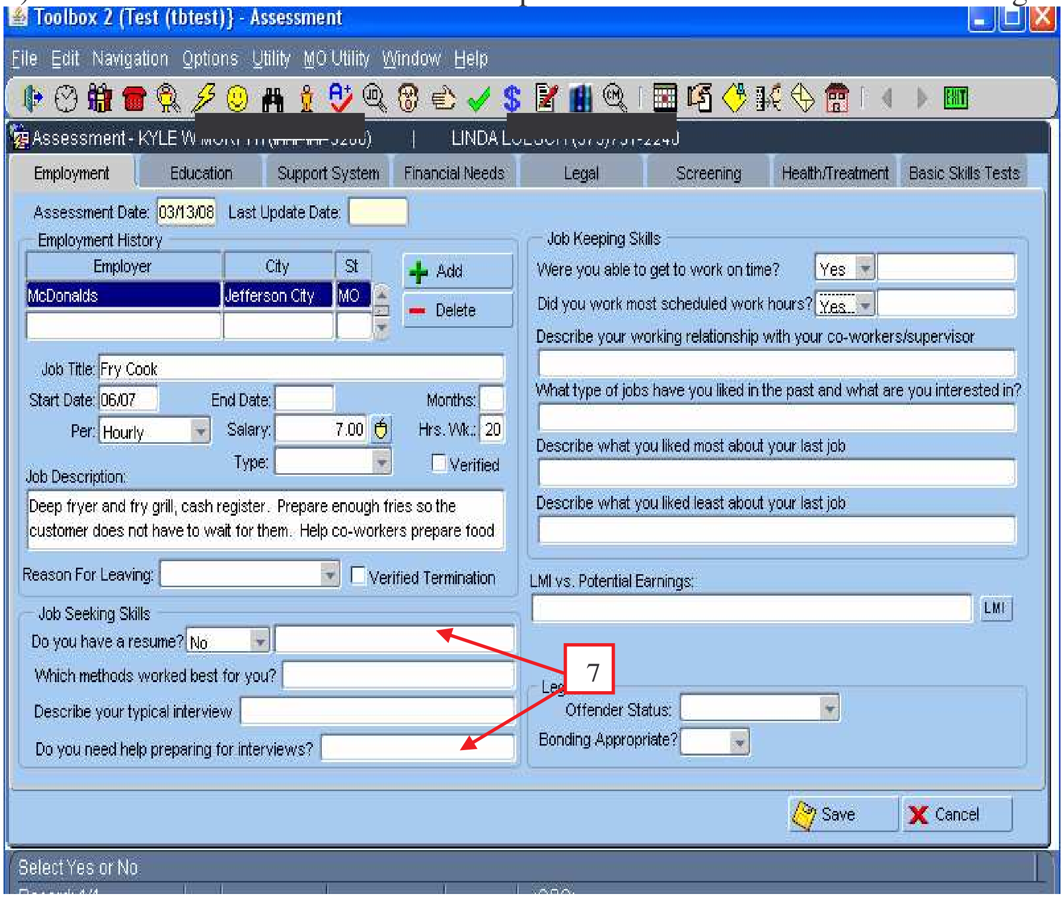

Figure 6: Assessment
Employment Tab Screen

Job Seeking Skills Section
The “Job Seeking Skills**”** section of the screen allows the worker to enter job search skills that the seeker has.

Step-by-Step:

7) In the “Job Seeking Skills” section of this screen, answer the following questions by entering the information in the text boxes. The questions to be answered are: “Do you have a resume”, “Which methods worked best for you?”, “Describe your typical interview” and “Do you need help preparing for interviews?”

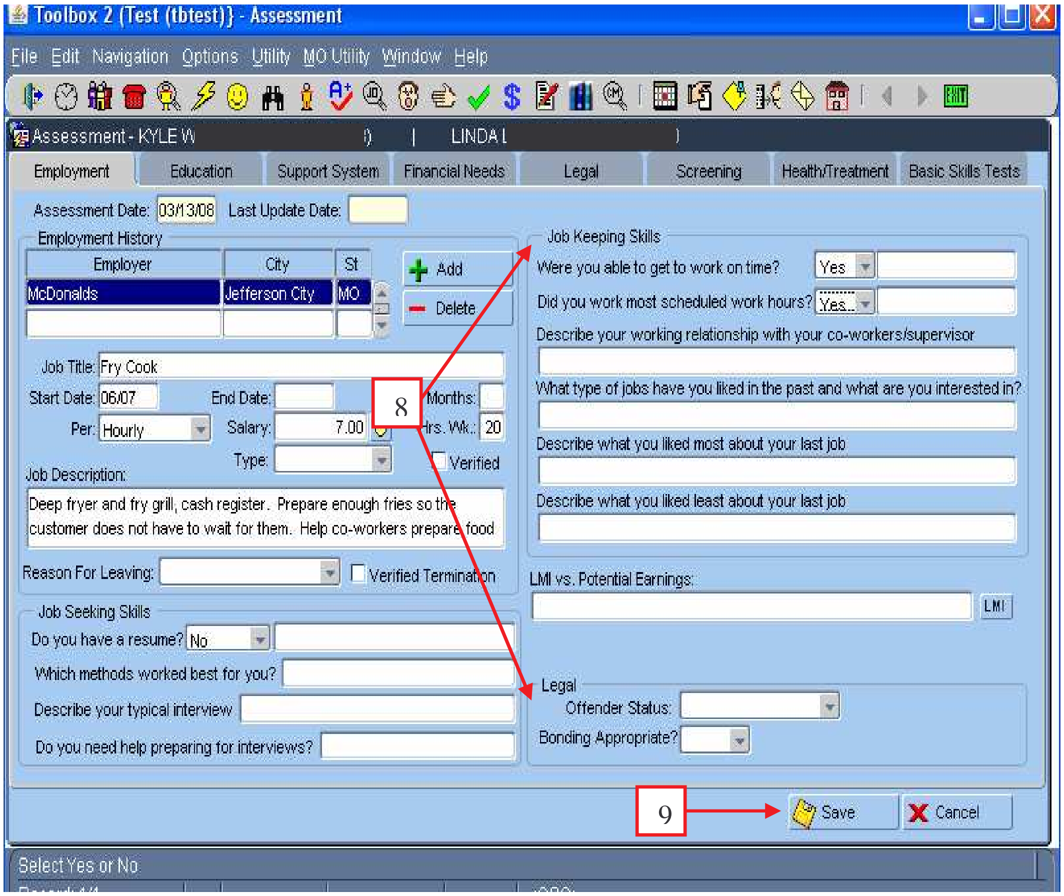

Figure 7: Assessment
Employment Tab Screen

Job Keeping Skills Section
The "Job Keeping Skills" section of the screen identifies skills that the jobseeker has for maintaining their employment. This section also includes an "LMI" button. The LMI button can be used to access State Labor Market Information.

Step-by-Step:

8) In the "Job Keeping Skills" section of this screen, answer the following questions by entering the information in the text boxes. The questions to be answered are: "Were you able to get to work on time?", "Did you work most scheduled work hours?", "What type of jobs have you liked in the past and what are you interested in?", "Describe what you like most about your last job?", "Describe what you like least about your last job?", "LMI vs. Potential Earnings", "Offender Status" and "Bonding Appropriate?".
9) Click on "Save" button.

<u>The Assessment Education</u> is used to enter information about the customer’s educational background. Information entered on this screen will help the worker understand the customer’s educational strengths and weaknesses.

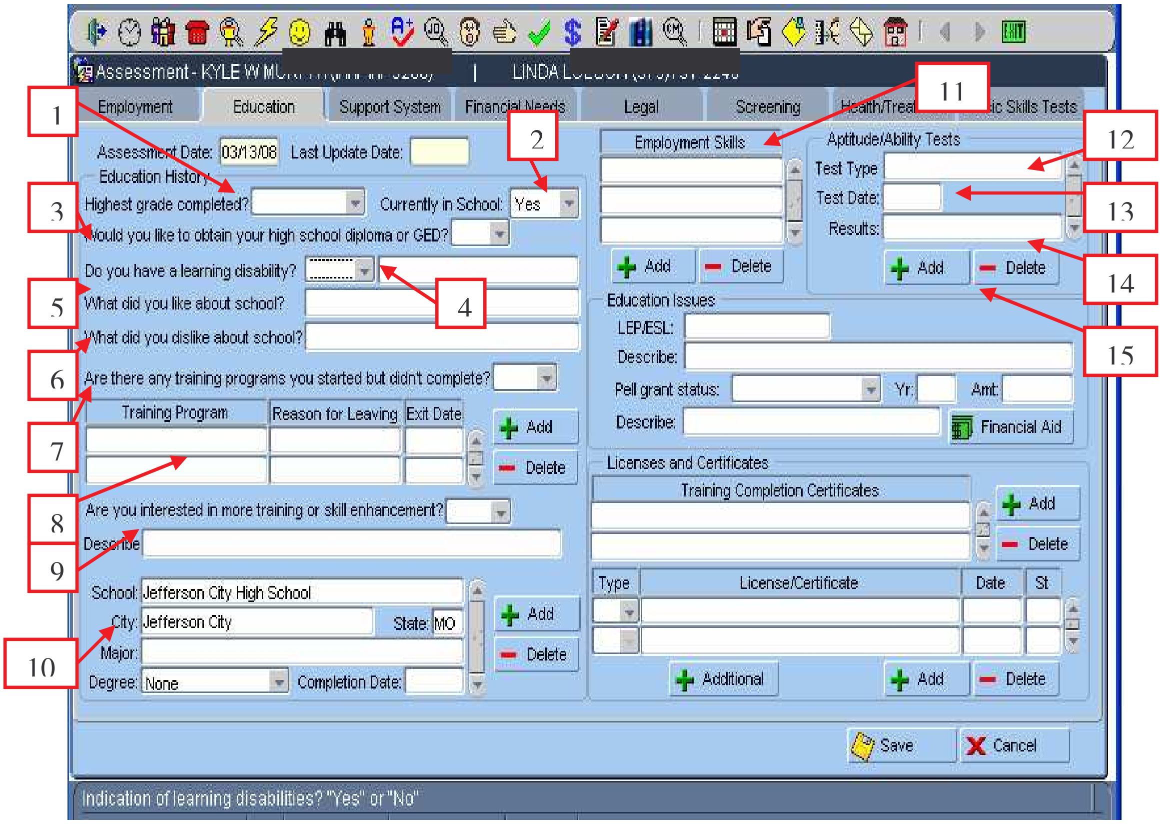

Figure 8: Assessment
Education Tab Screen

Education History Section

The “Education History” section of the screen lists the customer’s education history. This information pre-populates from the Seeker screen. New records can be added here and will display on the Seeker screen.

Step-by-Step:

1) Select the “Highest grade completed” from the dropdown box.
2) Select “Yes” or “No” if “Currently in School”.
3) Select “Yes” or “No” for “Would you like to obtain your high school diploma or GED?”
4) Select “Yes” or “No” for “Do you have a learning disability”. If the participant has a learning disability, double click on the text box to describe the participant’s disability.
5) In the text box, describe what the participant “Liked about school”.
6) In the text box, describe what the participant “Disliked about school”.
7) Select “Yes” or “No” if the participant did not complete.

8) In the text boxes, list the “Training Program” they did not complete, the “Reasons for Leaving”, and the “Exit Date”.
9) Select “Yes” or “No” if the participant is “Interested in more training or skill enhancement”. In the next text box, describe what type of training they are interested in.
10) Additional education information may be added; to add, click on “Add” button. Enter “School” name in the new text box. Enter the “City”, “State”, and “Major”. Select the type of “Degree” from the dropdown box. Enter the “Completion Date”.
11) Double click in the “Employment Skills” text box to receive the List of Values to select the participant’s employment skills.
12) Double click in the “Aptitude/Ability Tests” text box to receive the List of Values to select the “Test Type” to enter the type of test the participant took.
13) Enter the “Test Date” in the text box.
14) Enter the participant’s scores in the “Results” text box.
15) If additional tests need to be entered, click on the “Add” button.

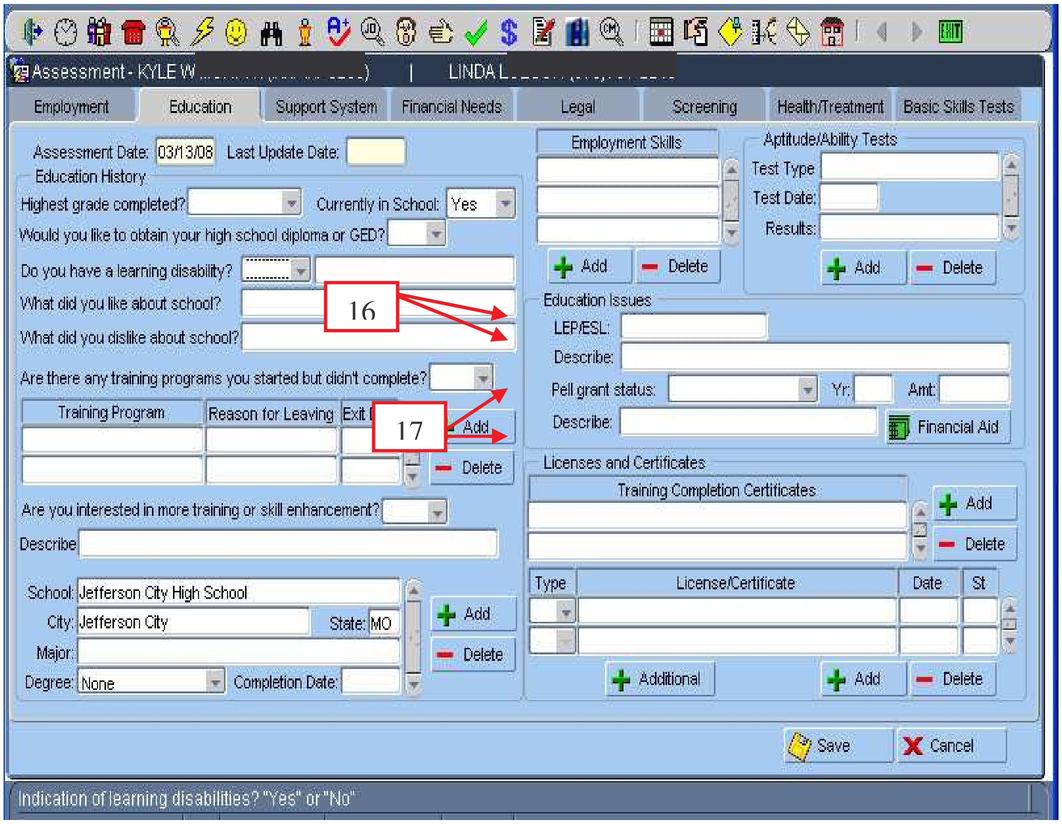

Figure 9: Assessment
Education Tab Screen

Education Issues Section
The "Education Issues" section of the screen allows the worker to enter possible education issues the customer may have. The Financial Aid button provides access to the Free Application for Federal Student Aid (FAFSA) web site.

Step-by-Step:

16) If the participant has a limited English proficiency, indicate the primary language by double clicking in the "LEP/ESL" text box to receive the List of Values. Describe in the text box, any barriers the participant has because of their LEP/ESL.
17) Select the participant's "Pell grant status" from the dropdown box. Enter the "Year" and "Amount" in the text boxes.

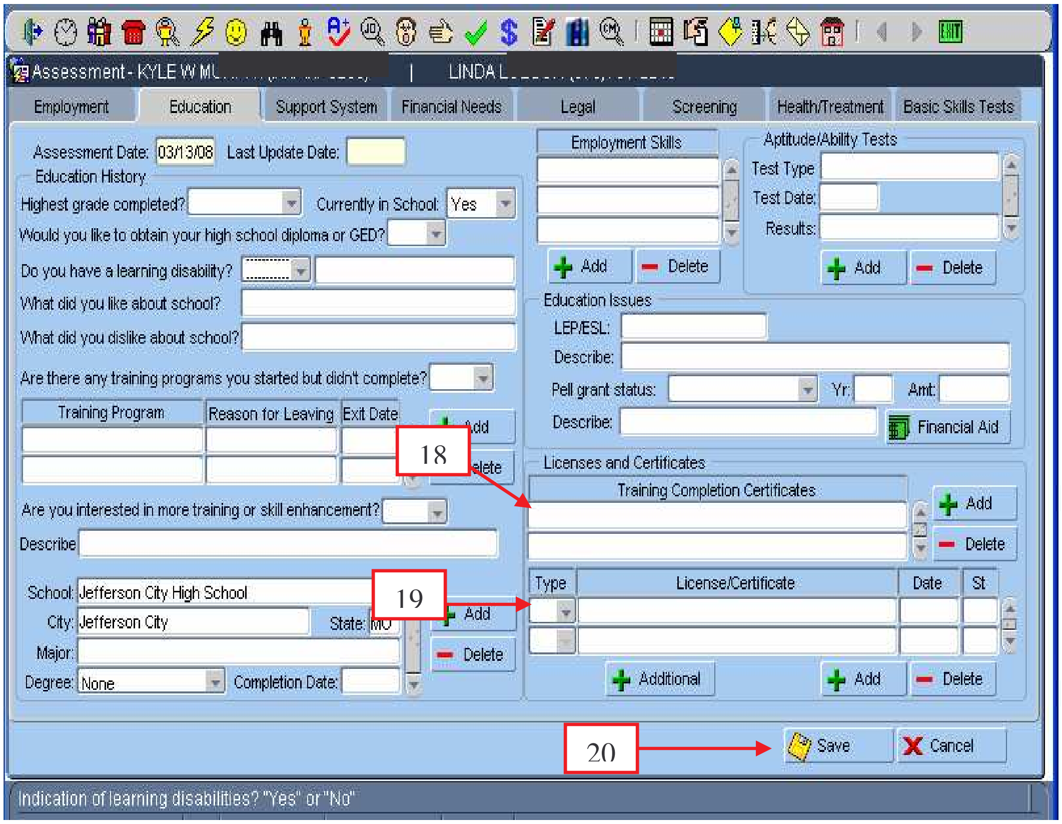

Figure 10: Assessment
Education Tab Screen

Licenses and Certificates Section
The "Licenses and Certificates" section of the screen lists "Certificates of Training and Licenses/Certificates**"** the customer may have. New records can be added here and will display on the Seeker screen. The **"**Additional**"** button is a pop-up that displays Additional Education records for education not related to a specific degree.

Step-by-Step:

18) To add additional "Training Completion Certificates", enter the description of the Training Certificate" in the text box.
19) To enter additional "Licenses and Certificates", select the type of License and/or certificate from the dropdown box. Enter the description of the License and/or Certificate in the text box. Enter the completion "Date" in the next text box. Double click in the "State" text box to receive the List of Values to enter the State abbreviation where the License and/or Certificate were received.
20) Click on "Save" button.

<u>The Assessment Support System tab screen</u> is used to enter information about the customer's family. Information entered on this screen will help the worker understand the customer's family situation including potential for support and any dangers that may be family related.

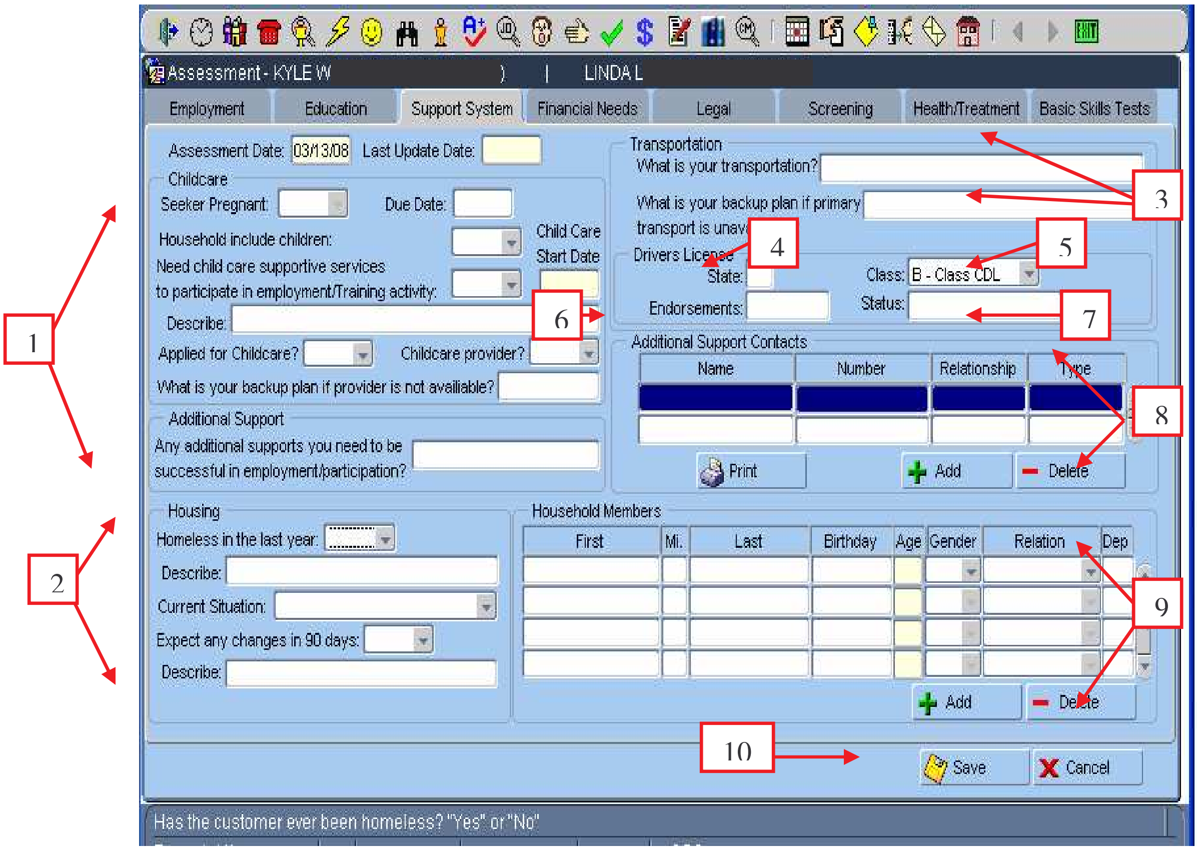

Figure 11: Assessment Support System Tab Screen

Step-by-Step:

1) The **Child Care** and **Additional Support** section of the screen can be used to assess any childcare or other needs the customer has. Complete the following fields:
   - Seeker Pregnant
   - Due Date
   - Household include children
   - Need child care supportive services to participate
   - Describe need
   - Applied for Childcare?
   - Childcare Provider
   - What is your backup plan if provider is not available?
   - Any additional supports you need to be successful in employment/participation?

2) The **Housing** section of the screen provides current and past housing information. Complete the following fields:
    - Homeless in the last year? Describe situation
    - Current situation
    - Expect any changes in 90 days, describe.
3) The **Transportation** section of the screen allows the worker to enter transportation problems and solutions. Complete the following questions.
    - What is your transportation?
    - What is your backup plan if primary transportation is unavailable?
4) Enter the "State" the participant was issued a Drivers License.
5) Select the "Class" of Driver License from the dropdown box.
6) Enter any "Endorsements" that the participant has by double clicking on the text box to get a List of Values to choose from.
7) In the "Status" text box, describe the current status of the participant's driver's license and vehicle insurance.
8) The **Support Contacts** section of the screen can be used to identify individuals that may be able to help support the family.
9) The **Household Members** section of the screen can be used to enter information about the family members living in the household.
10) Click the "Save" button.

The **__Assessment Financial Needs tab screen__** is used to determine the customer’s income and expenses.

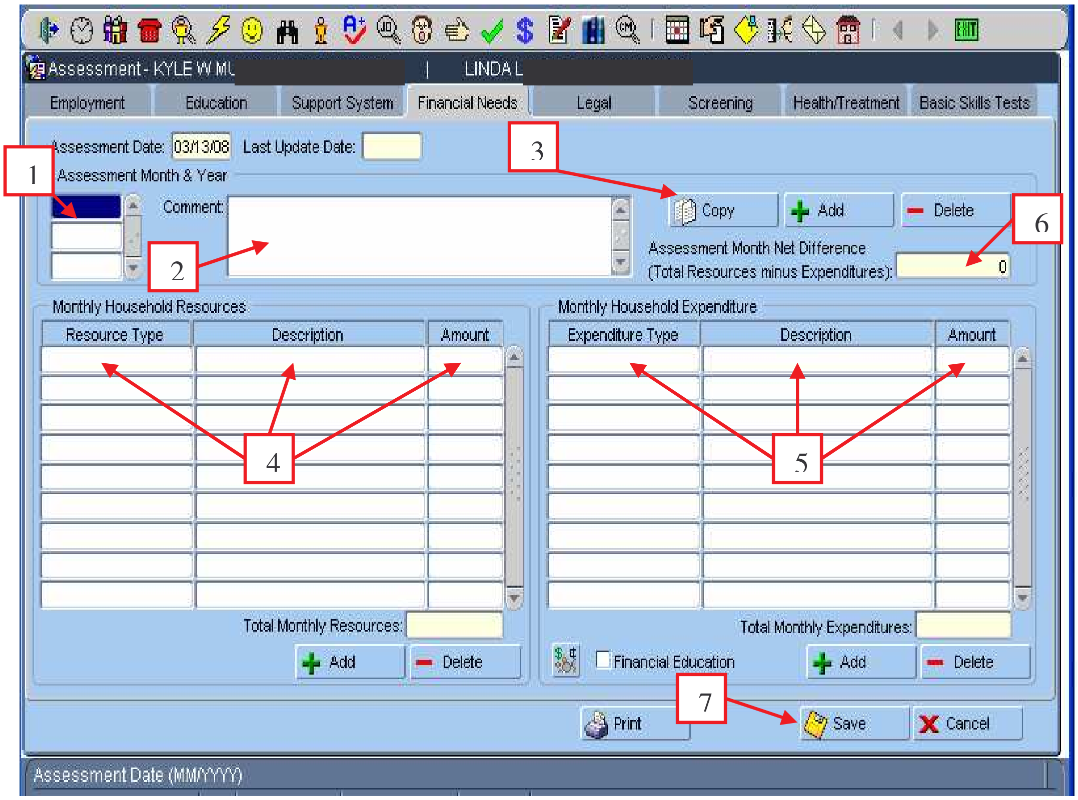

Figure 12: Assessment Financial Needs Tab Screen

Step-by-Step:

1) The **Assessment Month & Year** section of the screen can be used to enter the budget month and year. Click on the text box to enter the MM/YYYY.
2) Comments on the participant’s financial situation can be added in the “Comment” text box.
3) The **Copy** button allows the worker to copy another month’s budget information into the current month. After the information is copied it can be modified before it is saved. The **Add** and Delete buttons allow the worker to add new budget months or delete.
4) The **Monthly Household Resources** section of the screen is used to enter the resources the household has for a given month.
    - Identify the financial “Resource type” by double clicking on the text box to receive the List of Values.
    - Describe the resource type of earned income or alternative money in the “Description” text box.

- In the “Amount” text box, enter the anticipated monthly amount of the resource.

5) The **Monthly Household Expenditure** section of the screen is used to enter the expenses the household has for a given month.
    - Identify the “Expenditure type” by double clicking on the text box to receive the List of Values.
    - Describe the type of expenditures in the “Description” text box.
    - In the “Amount” text box, enter the monthly amount of the expense.
6) In the “Assessment Month Net Difference” text box, the gross resource dollar amount minus expenditures will appear after the resources and expenditures are added.
7) Click on the **Save** button

The **<u>Assessment Screening tab screen</u>** is used to determine if the customer has problems related to Substance Abuse or Domestic Violence. Unlike the rest of the Assessment screens, ask these questions exactly as they are written.

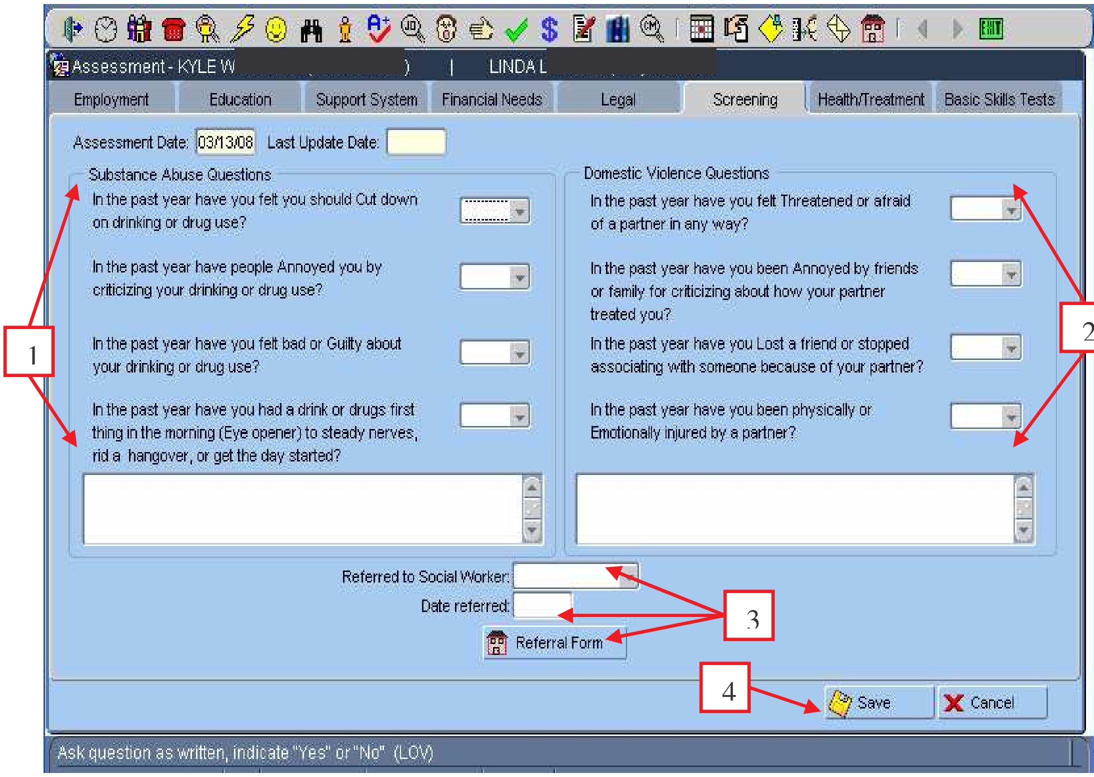

Figure 13: Assessment Screening Tab Screen

Step-by-Step:

1) The **Substance Abuse** section of the screen is used to ask the customer question about substance abuse. Complete the following fields:
    - In the past year have you felt you should Cut down on drinking or drug use?
    - In the past year have people Annoyed you by criticizing your drinking or drug use?
    - In the past year have you felt bad or Guilty about your drinking or drug use?
    - In the past year have you had a drink or drugs first thing in the morning (Eye opener) to steady nerves, rid a hangover, or get the day started?
2) The **Domestic Violence** section of the screen is used to ask the customer question about domestic violence. Complete the following fields:
    - In the past year have you felt Threatened or afraid of a partner in any way?

- In the past year have you been Annoyed by friends or family for criticizing about how your partner treated you?
- In the past year have you Lost a friend or stopped associating with someone because of your partner?
- In the past year have you been physically or Emotionally injured by a partner?

3) Select where the referral was made from the dropdown box. Enter today's date in the **Date-Referred** box and use the **Referral Form** button to create a referral and give to the customer.
4) Click on the **Save** button

The **<u>Assessment Health/Treatment tab screen</u>** is used to enter information about the customer's health.

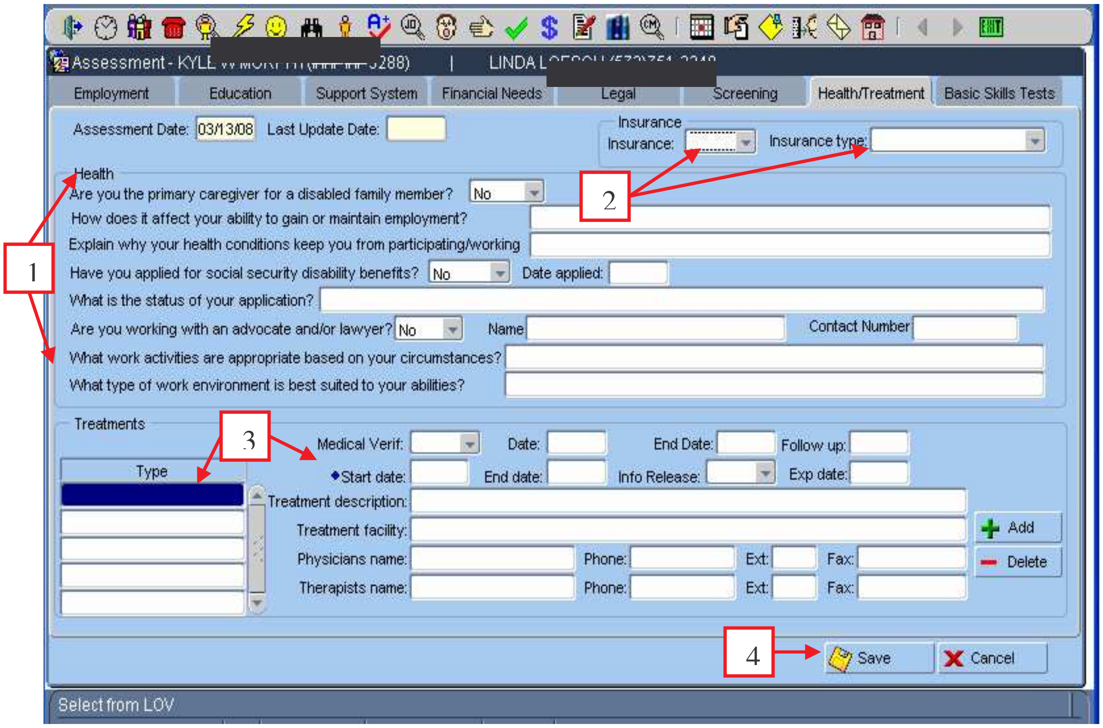

Figure 14: Assessment Health/Treatment Tab Screen

Step-by-Step:

1) The **Health** section of the screen can be used to enter Health concerns about the customer. Complete the following fields:
    - Are you the primary caregiver for a disabled family member?
    - How does it affect your ability to gain or maintain employment?
    - Explain why your health conditions keep you from participating/working.
    - Have you applied for social security disability benefits? Date applied.
    - What is the status of your application?
    - Are you working with an advocate and/or lawyer? Name. Contact Number.
    - What work activities are appropriate based on your circumstances?
    - What type of work environment is best suited to your abilities?
2) The **Insurance** section of the screen can be used to enter Insurance information the customer has. Choose "Yes" or "No" to indicate status of the participant's "Insurance". From the dropdown box, select the "Insurance type" the participant has.
3) Use the **Treatments** section of the screen to enter any information about Treatments the customer may be receiving. Complete the following fields:

- Double click or F2 in the "Type" field to select type of treatment the customer is receiving. Use the "Add" button if you need to enter multiple treatment records.
- Medical Verification, Date, End Date, and Follow up
- Start date, end date, Information release, and Expiration date.
- Describe the treatment activity that is recommended by the physician in the "Treatment description".
- Treatment facility.
- Physician name, Phone, Ext. and Fax.
- Therapists name, Phone, Ext. and Fax.

4) Click on the **Save** button

<u>The Basic Skills Tests tab screen</u> gives detailed information about Math, Reading and Writing tests taken / entered into the Toolbox 2 system.

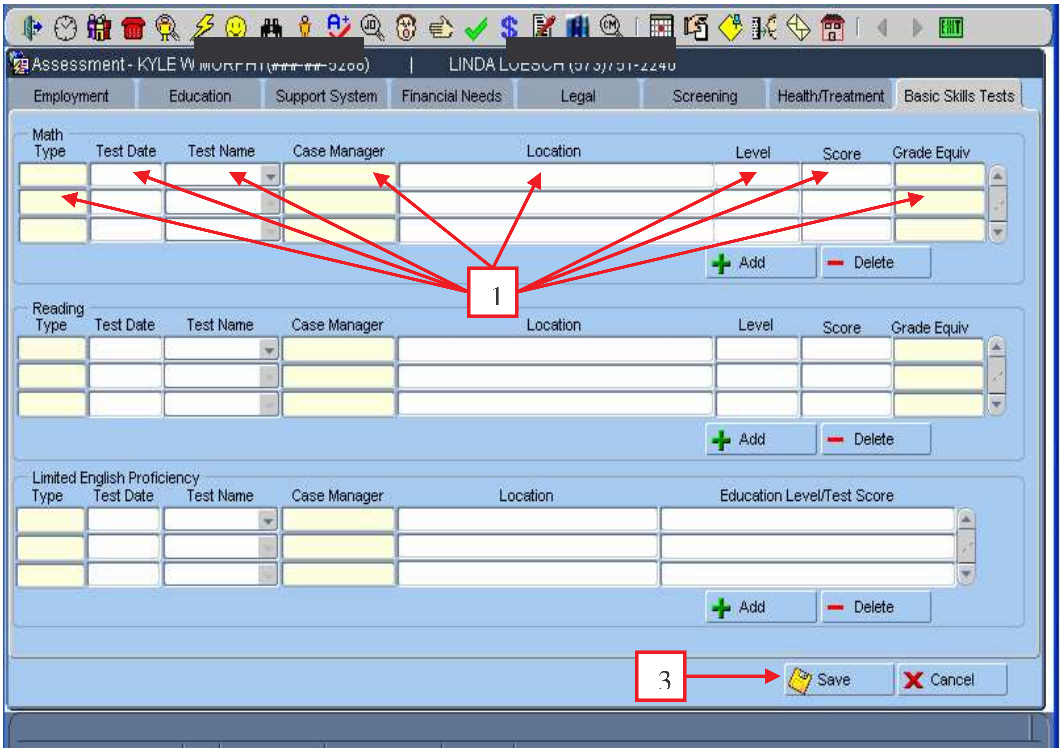

Figure 15: Assessment
Basic Skills Tests Tab Screen

Step-by-Step:

1) Youth Scores allow the worker to see how the Youth customer is progressing in their **Math, Reading and Writing/Language** proficiency. Complete the following fields in the test (Math, Reading, and/or LEP) you have given:
   - Type
   - Test Date
   - Test Name
   - Case Manager
   - Location
   - Level
   - Score
   - Grade Equivalent
2) Tests can be entered on this screen or on the **Youth Scores** tab in the Testing section of the system. See ***Figure 16.***
3) Click on the **Save** button

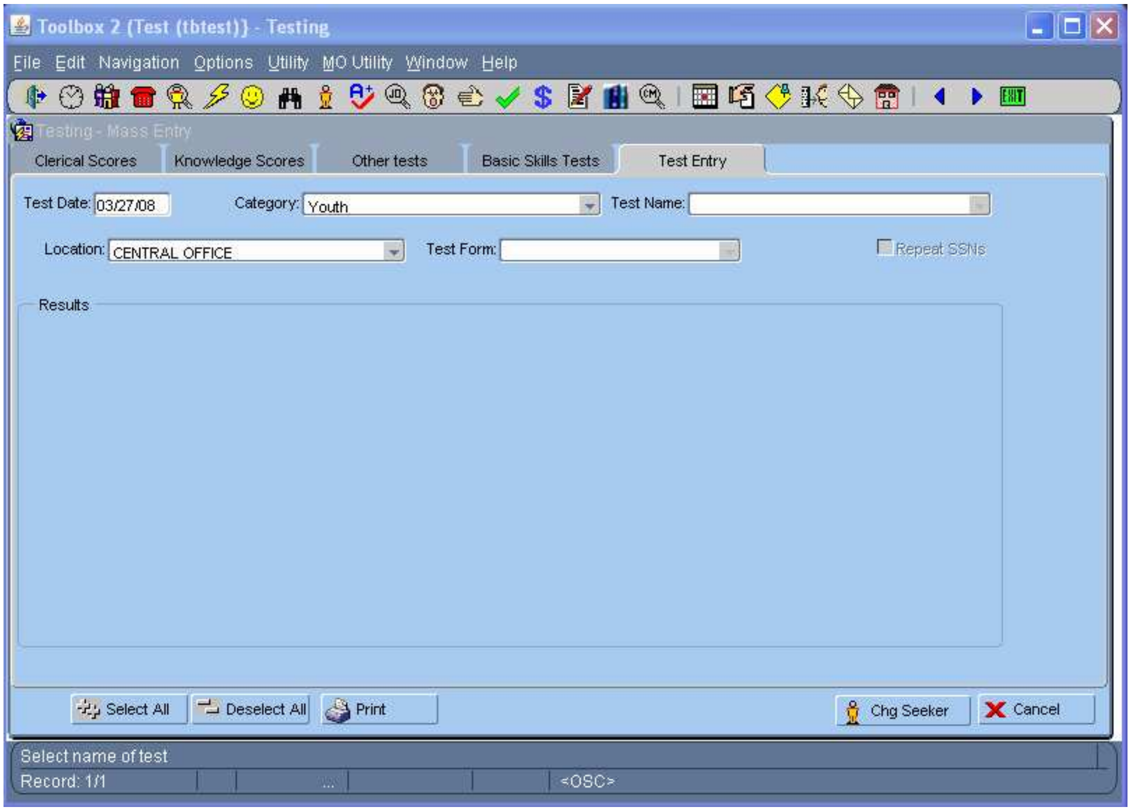

Figure 16: Testing- Mass Entry
Youth Category Test Entry Screen

Eligibility

Click on Eligibility Icon  from the Seeker Info page.

The Eligibility Application tab screen is used to enter general information about a customer that is being considered for training services. Most of this information could be populated if the job seeker completed the application on-line.

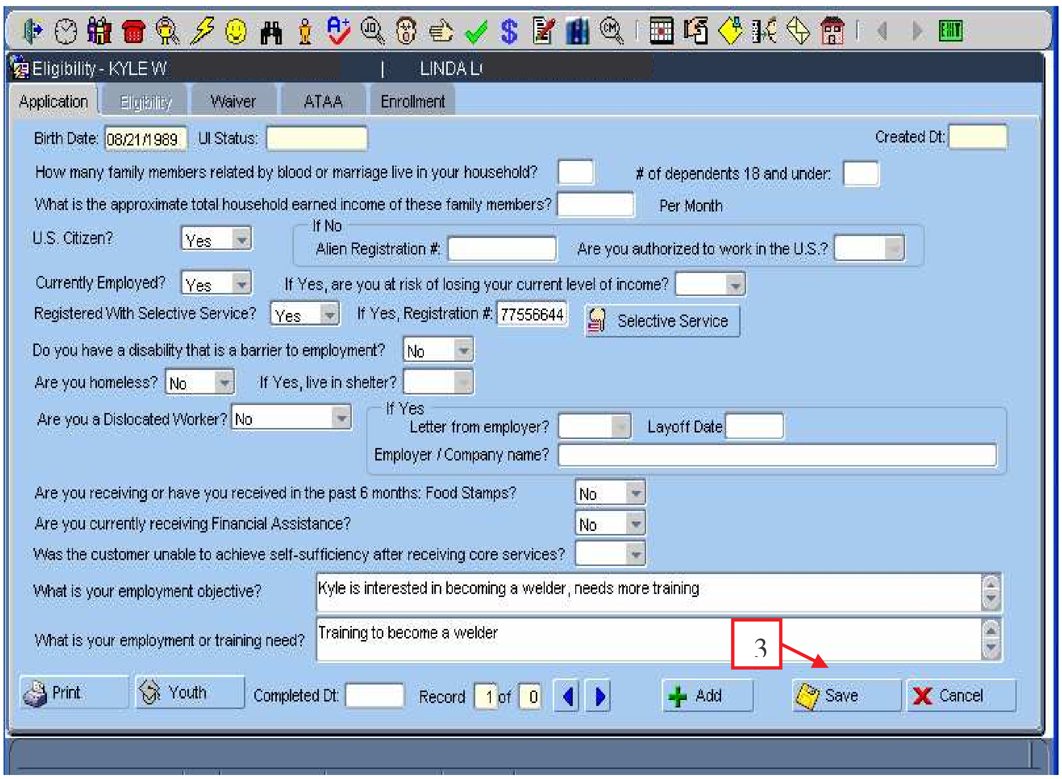

Figure 17: Eligibility Application Screen

Step-by-Step:

1) Complete the text boxes that have not been pre-populated.
2) Anything entered on this screen does not change seeker screen.
3) Click on the **Save** button

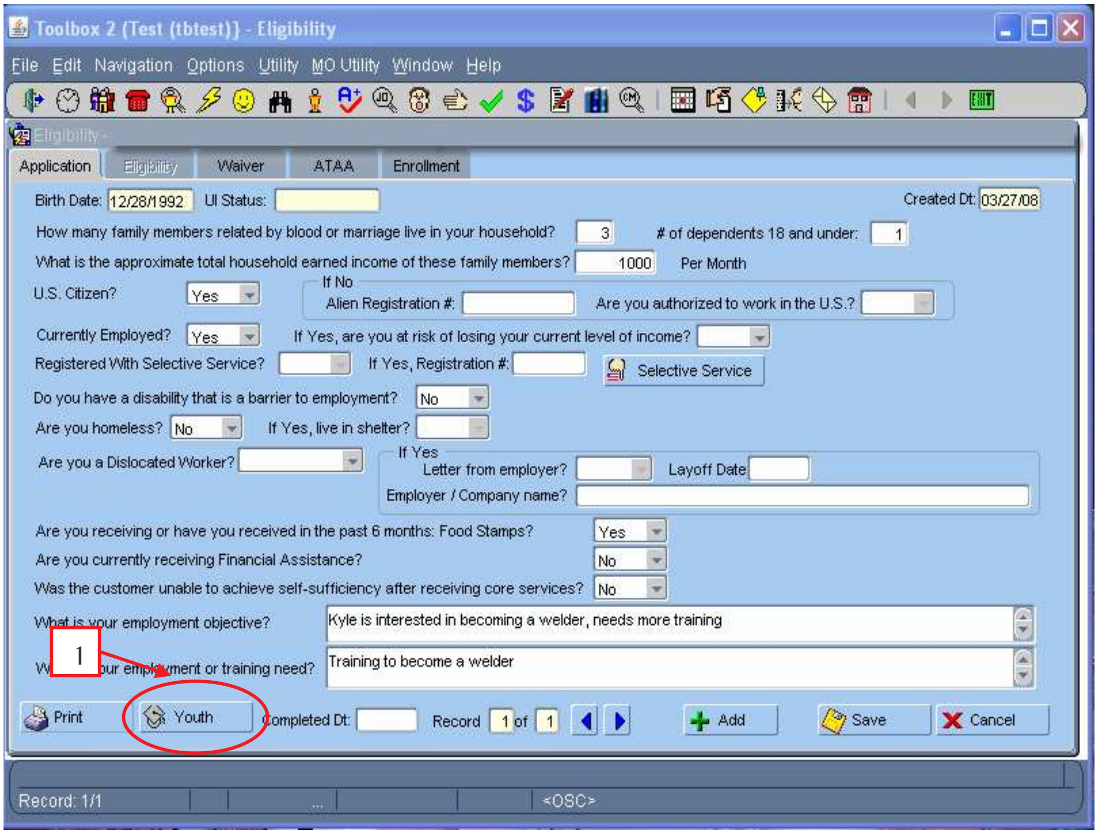

Figure 18: Eligibility Application Screen

Step-by-Step:

1) If customer is a **Youth** (age 14 through 21) click on the youth button
2) The Youth Application Pop-up will appear. See ***Figure 19***

The Youth questions help the worker determine problem areas that the customer may have. The answers to these questions will populate on the eligibility Barriers pop-up and determine if the customer is eligible for youth services.

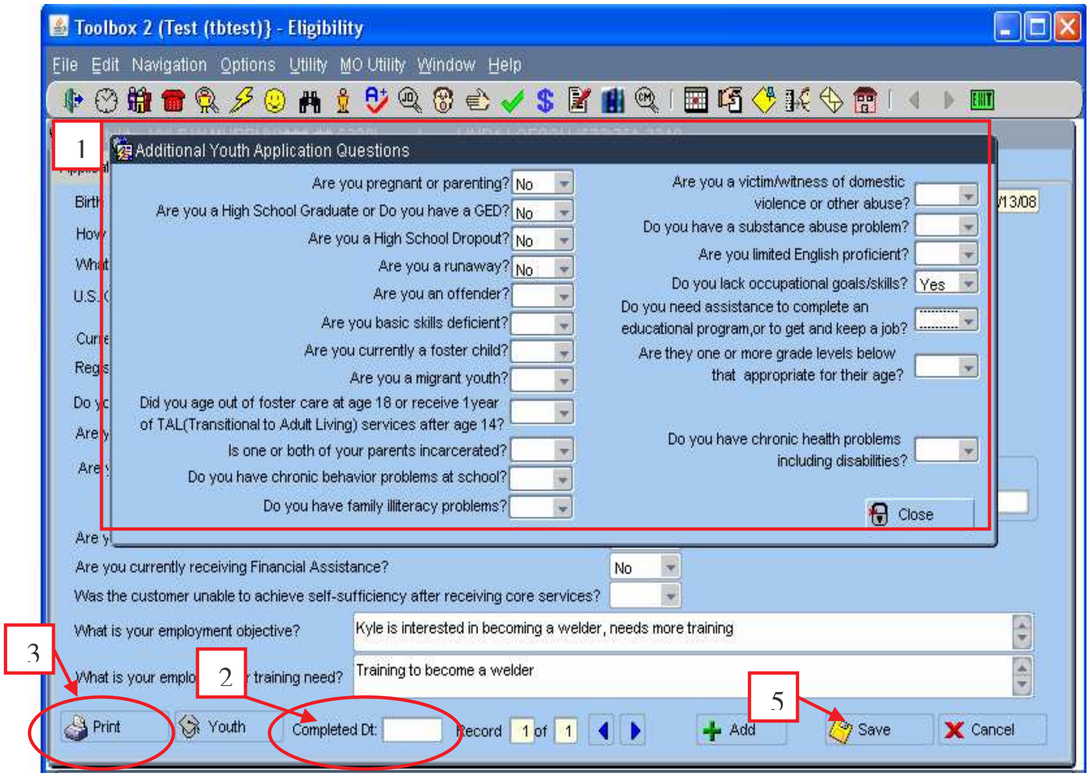

Figure 19: Eligibility
Youth Application Screen

Step-by-Step:

1) On the Youth Application pop-up screen complete the following fields before entering the application completion date.
    - Are you pregnant or parenting?
    - Are you a High School Graduate or Do you have a GED?
    - Are you a High School Dropout?
    - Are you a runaway?
    - Are you an offender?
    - Are you basic skills deficient?
    - Are you currently a foster child?
    - Are you a migrant youth?
    - Did you age out of foster care at age 18 or receive 1 year of TAL services after age 14?
    - Is one or both of your parents incarcerated?
    - Are you limited English proficient?
    - Do you lack occupational goals/skills?
    - Do you need assistance to complete an educational program, or to get a job?

- Are they one or more grade levels below that appropriate for their age?
- Do you have chronic health problems including disabilities?

2) Enter the “Completion Date”. This will freeze the application so no changes can be made.
3) Select the “Print” button to print a report of the application information.
4) The customer must sign the printed application.
5) Click on the “Save” button.

<u>The Eligibility tab screen</u> is used by the worker to determine if a customer meets the eligibility requirements for training programs. Some of the information on this screen is pre-populated from the seeker screens and eligibility application and does not have to be entered.

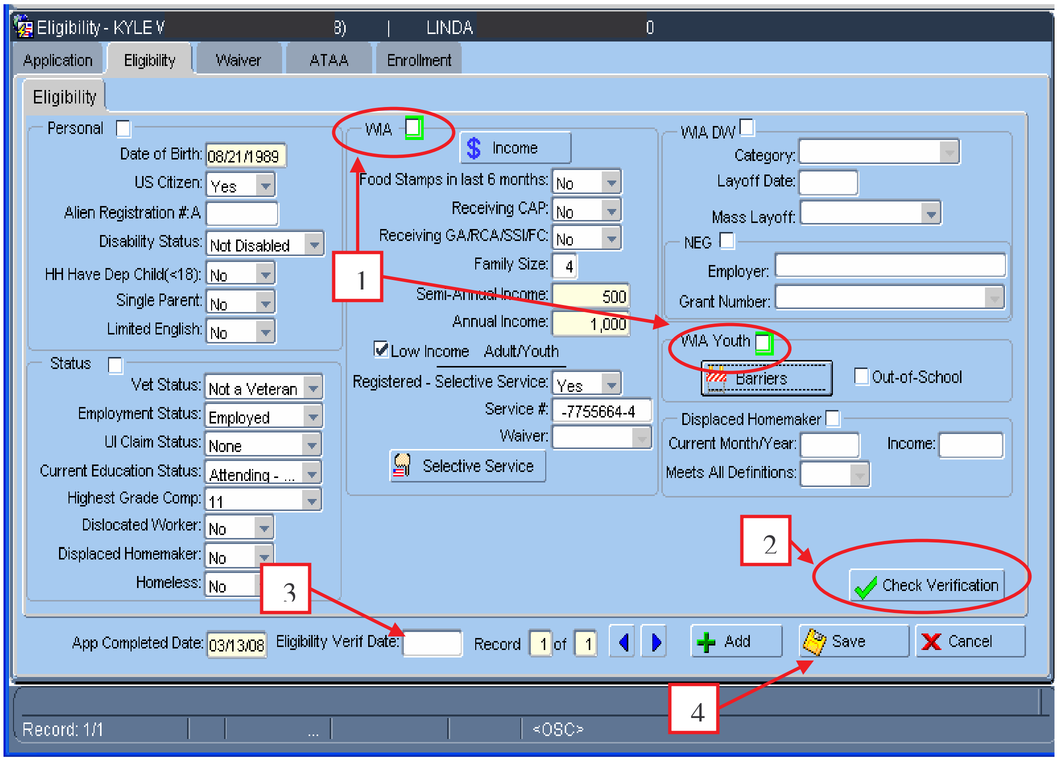

Figure 19: Eligibility Eligibility Screen

Step-by-Step:

1) As information is entered into the specific sections the box next to the Program will become highlight in green. When the program box becomes highlighted the eligibility rules for this program have been met.
2) The program is not considered as eligible until the program box is highlighted in green and has a check in it. The "check" is populated when the case manager clicks the **"**Check Verification**"** button and checks off all the items that they have verified.
3) When the desired programs are highlighted in green and the box(s) are checked the case manage enters "today's date" in the **"**Eligibility Verification Date**"** text box. This freezes the record. The eligible programs populate on the "Enrollment**"** screen in the Eligible Enrollments section.
4) Click on the "Save" button.

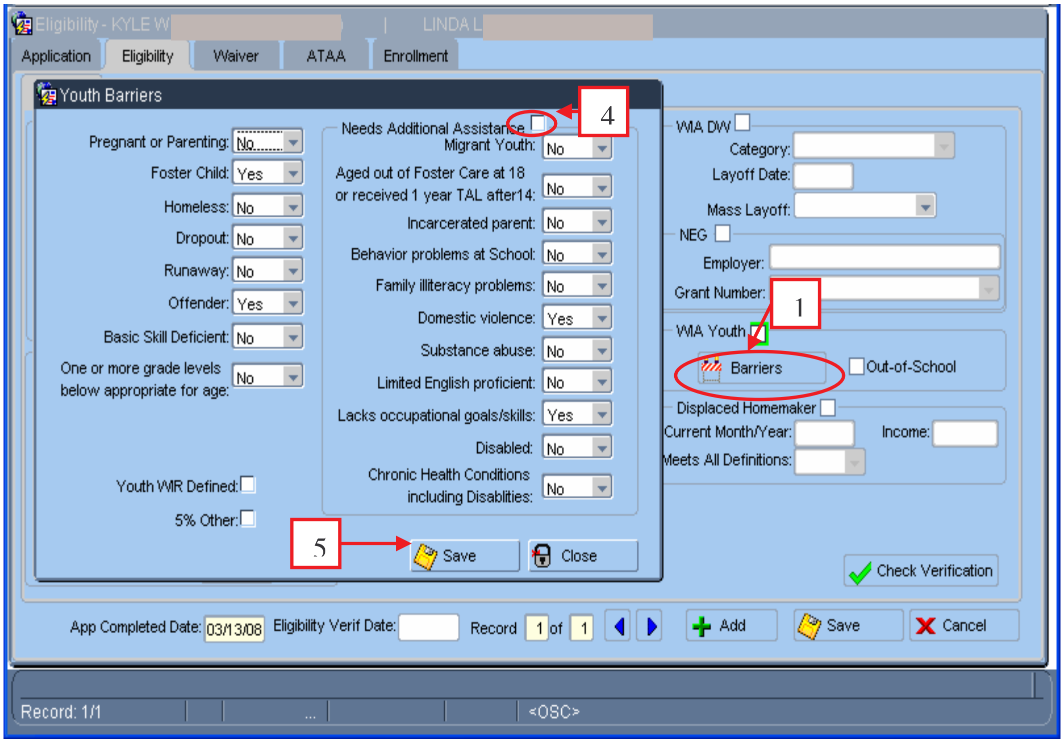

Figure 19: Eligibility
Youth Barriers Pop-up Screen

Step-by-Step:

1) Select the "Barriers" button on the "Eligibility" screen.
2) The "Youth Barriers" pop-up screen opens. This screen must be completed before the customer is eligible for Youth program services. This pop-up will not be available if the customer is not a Youth.
3) The answers on this pop-up are pre-populated from the Youth Application. If changes need to be made the worker can make the changes on this screen.
4) The left column shows "Youth Barriers" while the right column has the "Youth at Risk" questions. If any of the answers in the Youth at Risk column are answered "yes" the "Youth at Risk" box at the top of the screen <u>will be checked</u>.
5) Click on the "Save**"** button

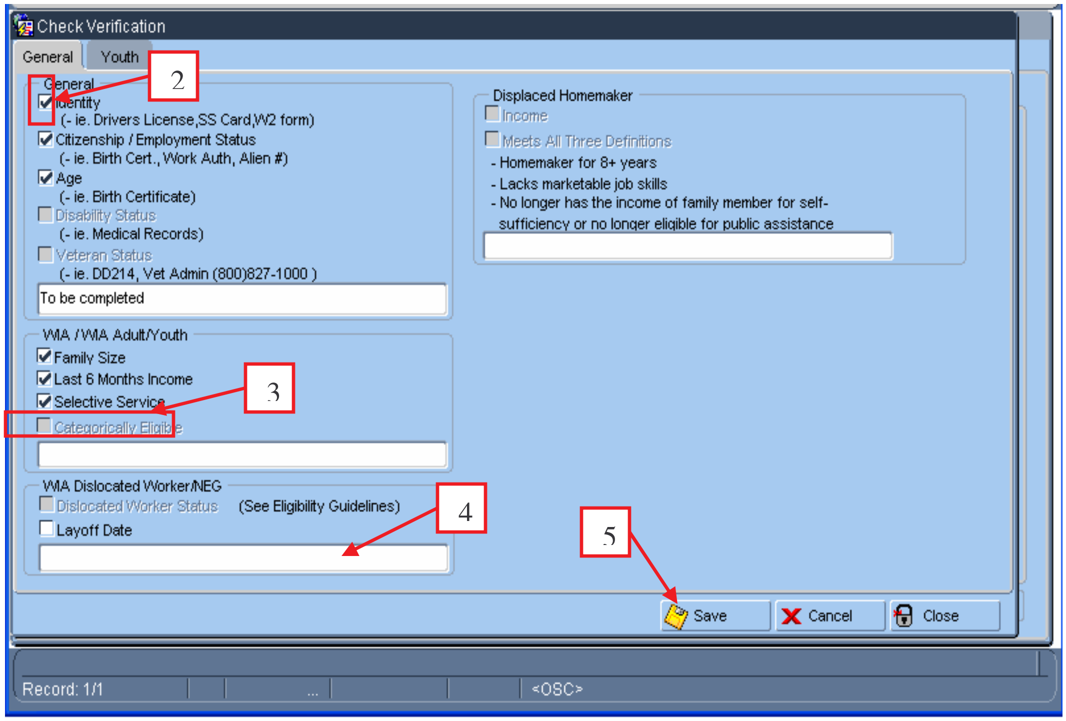

Figure 20: Eligibility
General Check Verification Pop-up Screen

Step-by-Step:

1) The “Check Verification General” pop-up screen opens when the case manager selects the “Check Verification” button on the Eligibility screen. This screen must be completed before the customer is eligible for program services.
2) “Check” the boxes for the documents received from the customer that is required to verify information such as “Identity”, “Citizenship”, and/or “Age”.
3) If a box is grayed out the case manager cannot check the box since there is not a need to verify that information.
4) After each section there is a free format text box that the case manager must complete if boxes in that section were checked.
5) Click on the “Save” button.

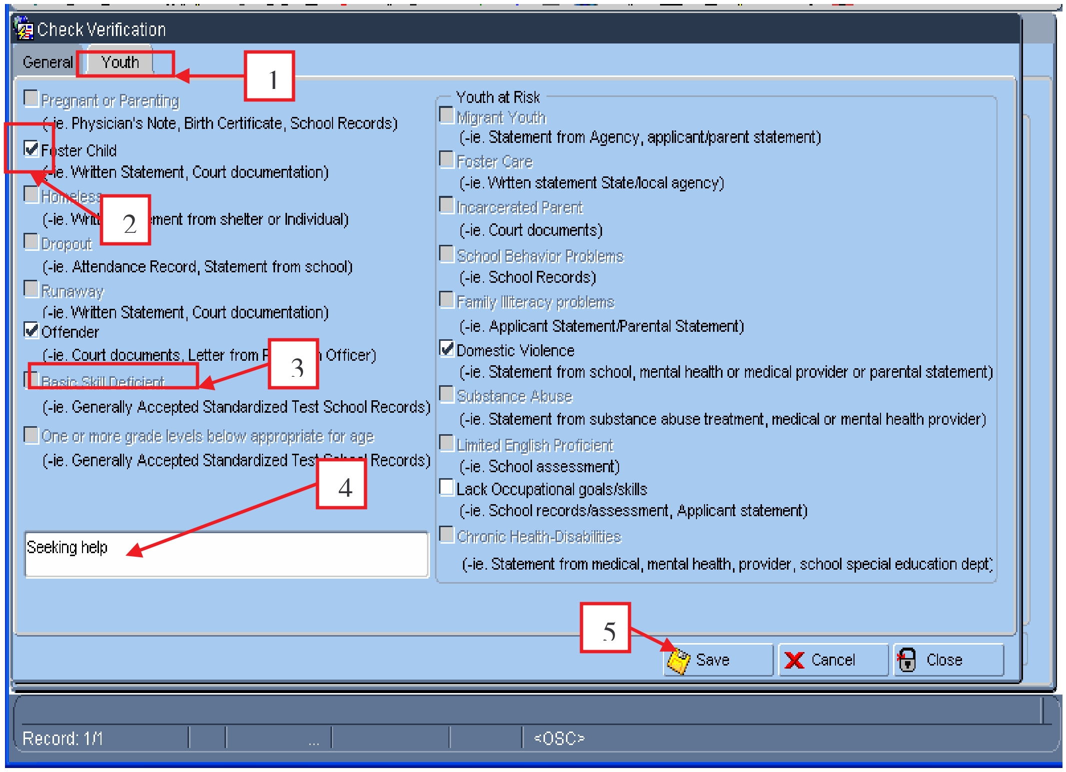

Figure 21: Eligibility
Youth Check Verification Pop-up Screen

Step-by-Step:

1) The "Youth Check Verification**"** pop-up opens when the worker selects the "Youth**"** tab. This screen must be completed before the customer is eligible for Youth program services. This tab will not be available if the customer is not a Youth.
2) **"**Check" the boxes for the documents received from the customer that is required to verify information such as "Identity", "Citizenship", and/or "Age".
3) If a box is grayed out the case manager cannot check the box since there is not a need to verify that information.
4) After each section there is a free format text box that the case manager must complete if boxes in that section were checked.
5) Click on the "Save**"** button

<u>The Eligibility Enrollment tab</u> screen is used to enroll customers in programs they are eligible and qualify for.

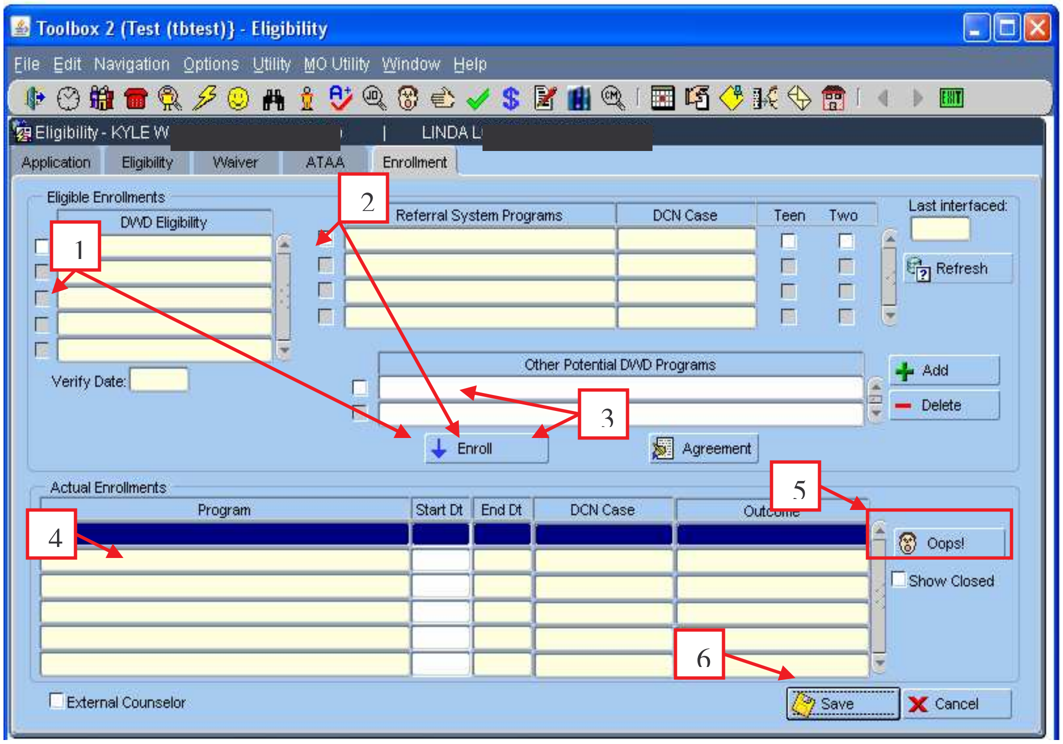

Figure 22: Eligibility Enrollment Screen

Step-by-Step:

1) "DWD Eligibility" section lists programs that the customers have passed the eligibility requirements. Determine if the customer is appropriate to participate. Programs show in this section after eligibility has been determined in Toolbox 2. Check the box next to the program and click on the "Enroll" button to enroll.
2) "Referral System Programs" section displays referrals from other system that have determined eligibility for programs. Check the box next to the program and click on the "Enroll" button to enroll customers in this program.
3) "Other Potential Programs" section lists are programs that do not require use of the Eligibility screen or a partner system to determine eligibility. Check the box next to the program and click on the "Enroll" button to enroll.
4) The "Actual Enrollments" section shows the program(s) the customer is actually enrolled in.
5) The "Oops!" button can be used to un-enroll an actual enrollment when an enrollment has been enrolled in error. The "Oops" button only works the day the enrollment is made.
6) Click on the "Save" button

Use the **Employment Plan- Appropriateness screens** to determine if the customer is appropriate for training programs. This screen must be completed before the system will allow any training money to be used.

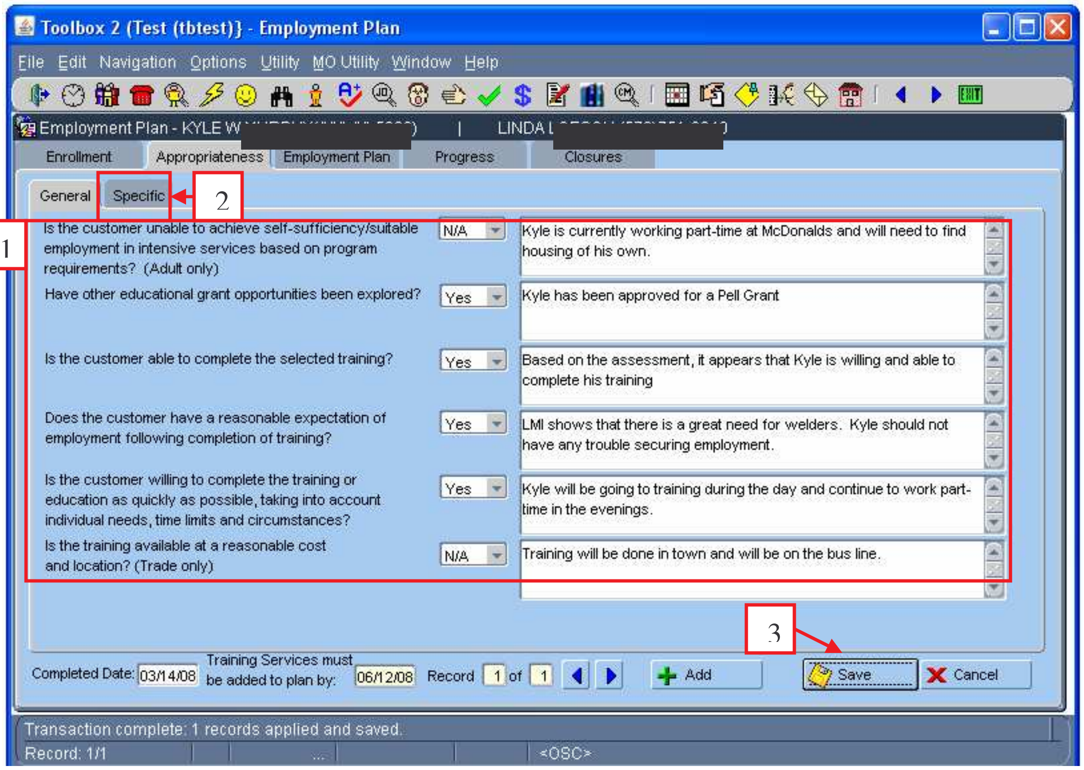

Figure 23: Employment Plan
Appropriate General Screen

Step-by-Step:

1) Answer "Yes", "No" or "N/A" for each of the six questions on the Appropriateness – General screen and then complete the information next to the question.
2) Click on the "Appropriateness – Specific" tab and complete screen before entering the completed date and freeze the record. See ***Figure 24***
3) Click on the "Save" button

Use the **Employment Plan Appropriateness – Specific tab screen** to enter additional information relating to the customers training appropriateness.

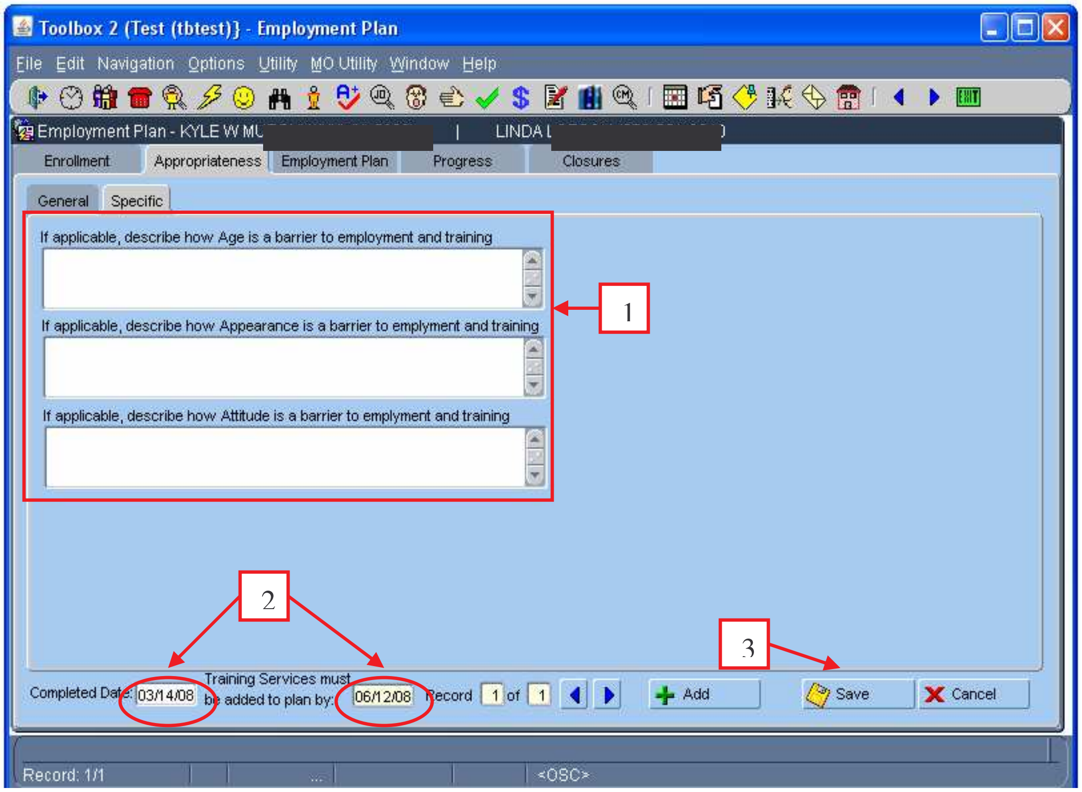

Figure 24: Employment Plan Appropriate Specific Screen

Step-by-Step:

1. Complete the text boxes under the three additional appropriateness questions. Those questions are:
   - If applicable, describe how Age is a barrier to employment and training.
   - If applicable, describe how Appearance is a barrier to employment and training.
   - If applicable, describe how Attitude is a barrier to employment and training.
2. Enter the "Completed Date" and the **"**Training Services must be added to plan by" date will populate. If training services need to be entered after the date this screen will need to be completed again.
3. Click on the "Save**"** button.

Employment Plan tab screen

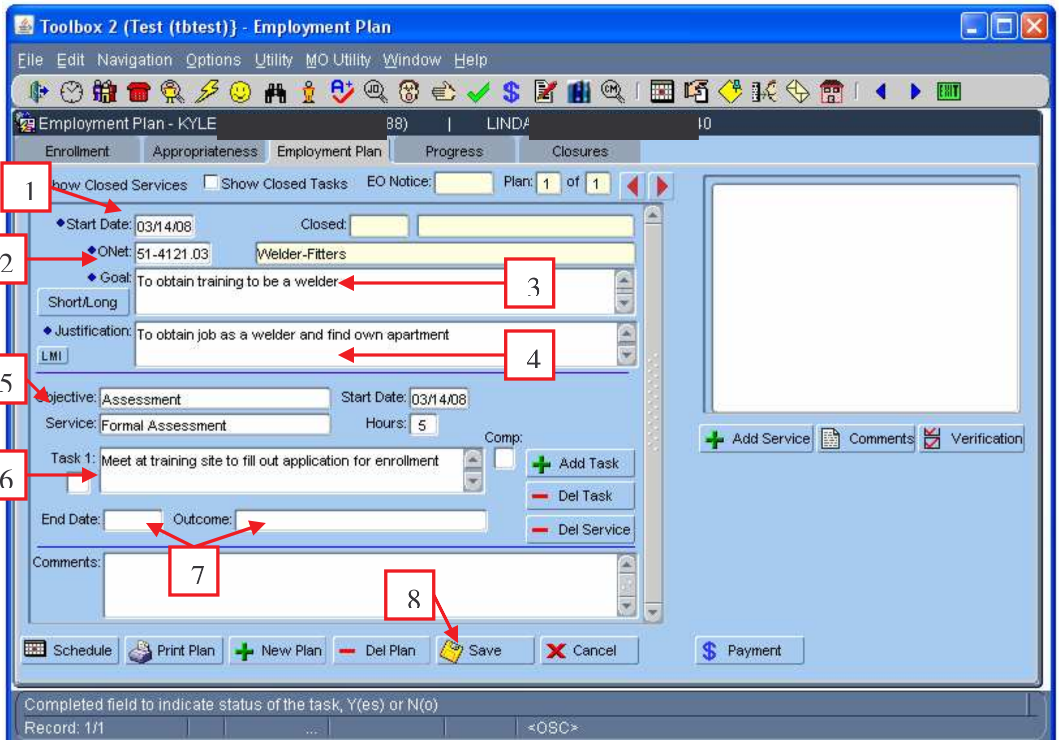

Figure 25: Employment Plan
Employment Plan Screen

Step-by-Step:

1. Enter a "Start Date".
2. Enter an "O*NET" code by double clicking on the text box. The O*NET codes chosen in the registration under the "Desired Job Titles" will appear. If new O*NET codes are needed, click the cancel button and there will be a prompt to choose from all O*NET codes.
3. Enter an "Employment Goal" in the text box.
4. Enter a "Justification" to explain the employment plan goal in the text box.
5. Enter an "Objectives" and a "Services" by double clicking in the text box for a list of values. Use "Objectives" and "Services" to build the outline of the plan. Objectives/Services can be closed when the customer has completed all the tasks related to the objective/service. Click the "Add Service" or "Del Service" buttons to add or delete objectives/services.
6. Once Objectives and Services are selected; a "Task" text box will appear. "Tasks" allow more specific detail about how the customer will meet each Objective/Service. Tasks are used to detail how the customer will achieve each section of their employment plan. Tasks can be set as completed (Y) or not completed (N). Click the "Add Task" or "Del Task" buttons to add or delete tasks.
7. Enter "End Date" and "Outcome" to close.
8. Click on the "Save" button

The **<u>Employment Plan- Progress tab screen</u>** is used to follow-up and plan monitoring that must occur when customers are involved in training programs.

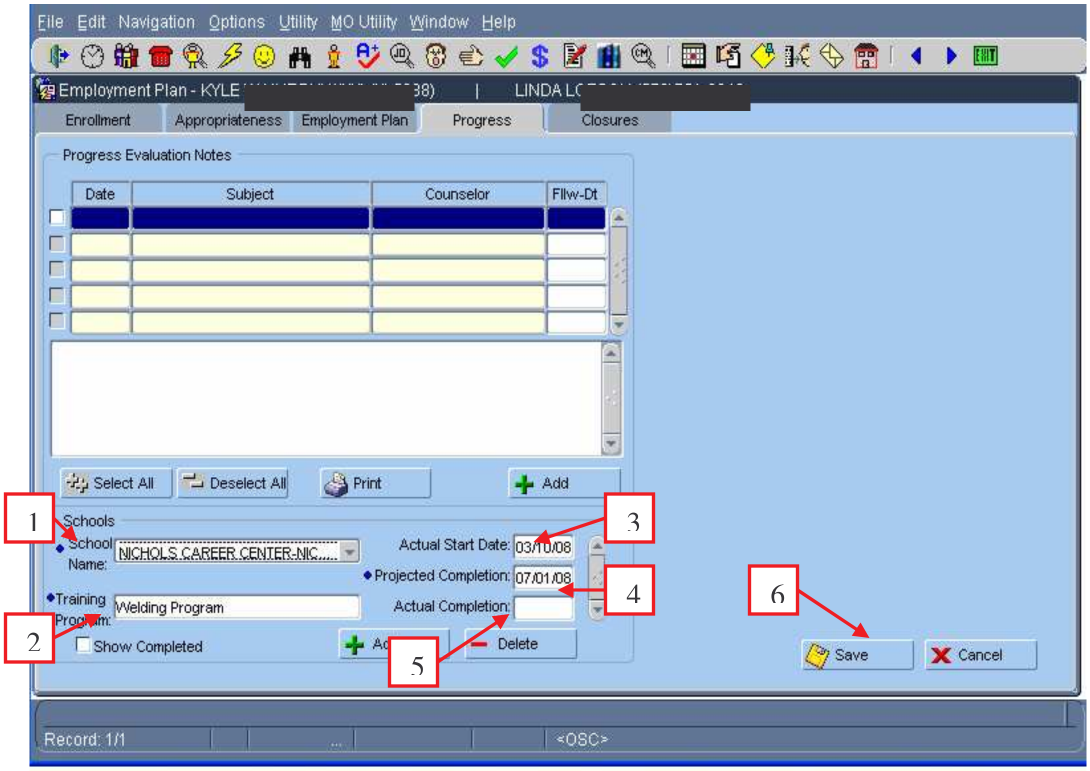

Figure 26: Employment Plan
Progress Screen

Step-by-Step:

1. The "Schools" section of the screen displays the "School Name" where the training is provided.
2. Enter "Training Program" the customer is in.
3. Enter the "Actual Start Date**".**
4. Enter the **"**Projected Completion" date.
5. Once training is completed, enter the "Actual Completion dates".
6. Click on the "Save**"** button

The **<u>Employment Plan-Closures tab screen</u>** provides Worker's the ability to close Services, Enrollments and the Employment Plan from one screen.

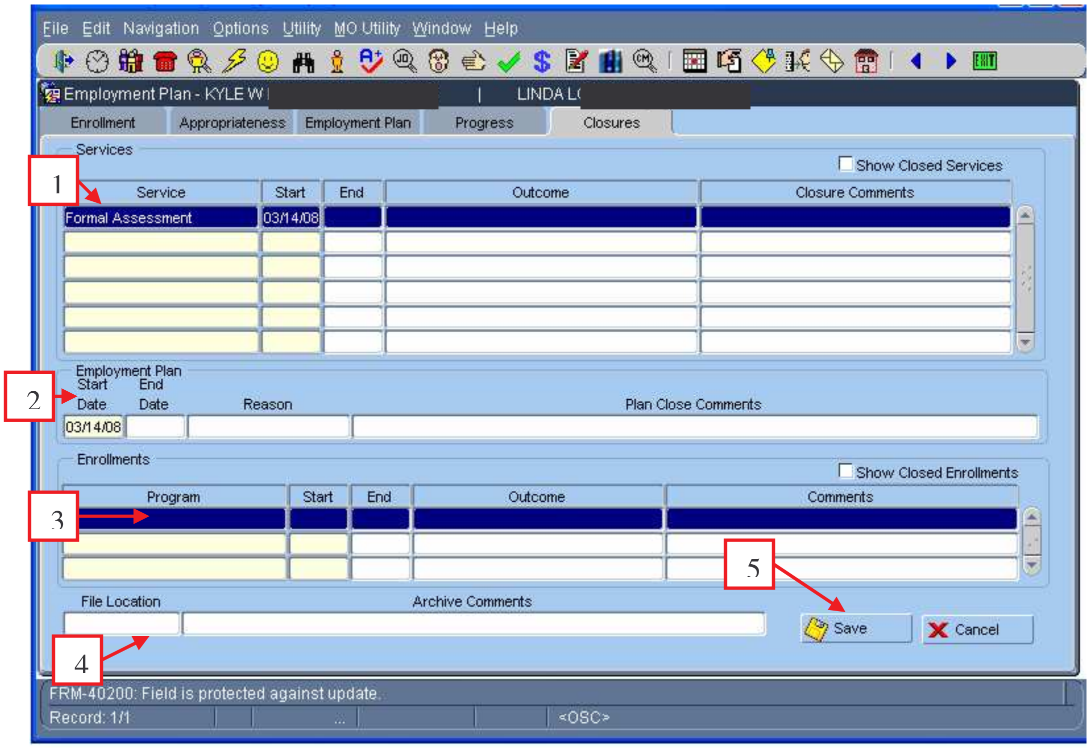

Figure 27: Employment Plan Closures Screen

Step-by-Step:

1. The "Services" section displays all of the open services for the current employment plan.
2. The "Employment Plan" section only displays the employment plan start date. To close the plan, enter the End Date and Reason for closure. The Plan Closure Comments field is optional and Reason is selected from a list (LOV). Employment plans cannot be closed if there are open services.
3. The "Enrollments" section displays all of the open enrollments. To see closed enrollments click the "Show Closed Services" box. To close enrollment enter an End Date and Outcome. The Comments field is optional and Outcomes are selected from a list of values.
4. The "File Location and Archive Comments" section is used to identify the location of cases. The information aide's workers looking for case file that closed in the past and now are re-opening.
5. Click on the "Save" button.